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ABSTRACT

This advisory manual for Alberta, Canada offers guidance for those involved in (1) deciding to operate an early childhood services (ECS) program; (2) establishing policies, guidelines, and procedures; (3) organizing a program; and (4) administering a program. Topics addressed in section I, which covers making the decision to operate an ECS Program, include jurisdiction, local and system advisory committees, coordination of services and supplies, and organizational structure. Section II, on establishing polices, guidelines, and procedures, offers a few suggestions and directs interested persons to Alberta Education's Program Policy Manual. Section III, concerning program organization, focuses on determining program needs, setting goals and objectives, and implementing and evaluating the program. Section IV, on program administration, provides information on these topics: legal operator status, certificated teaching personnel, provincially approved facility, Alberta Education Audited Financial Statement and Budget Report Form, enrollment report, transportation, capital equipment grant for new instructional area, capital renovation grant, annual equipment replacement grant, portable classrooms, teachers' retirement fund, payroll/Revenue Canada deductions, insurance and bonding, Federal sales and/or excise tax refund claims, grants available to ECS operators, and terminating the operation of an ECS program. Twelve appendices offer additional resources and suggestions. (RH)

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Advisory Manual on Early Childhood Services for the Incorporated Non-Profit Society or Private School

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Early Childhood Services

September 1990

Alberta
EDUCATION

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I. DECIDING TO OPERATE AN EARLY CHILDHOOD SERVICES (ECS) PROGRAM

1.1 Jurisdiction: Incorporated Non-Profit Society or Private School

Any group or individual may call meetings to initiate the organization of an Early Childhood Services (ECS) program.

Usually, private school staff (teacher, principal or coordinator) and/or board members will be involved in organizational meetings if an ECS program is to be added to the existing program of a private school.

In either case, interested parents will be involved.

- The following documents will be of assistance during the initial planning stages:

  Philosophy, Goals and Program Dimensions: Early Childhood Services (1984)

  Program Policy Manual

  School Grants Manual, Part 4

- See Appendix A for a list of questions which may form the agenda of an organizational meeting.

- See Appendix B for information about BY-LAWS (the basis of incorporation), SOCIETY MEMBERSHIP and RESPONSIBILITIES OF THE BOARD OF DIRECTORS.

- See Appendix C for information about MINUTES which form the record of business undertaken by the incorporated society.

1.2 Local Advisory Committee

When a decision is made to establish or continue operation of an ECS program, a Local Advisory Committee (LAC) should be formed to provide advice to the operator; in this case, the incorporated non-profit society or the board of a private school.

The operator has final responsibility for decisions, including those delegated to LAC, staff or volunteers.

The LAC provides opportunity for parents, staff and resource people to share ideas and work together.

To be effective the LAC must have a clear understanding of its relationship to the operator. It is the operator's responsibility to clarify and maintain this relationship and to provide support for effective functioning of the LAC.

- See Appendix D for information about LOCAL ADVISORY COMMITTEE (LAC) RESPONSIBILITIES AND MEMBERSHIP.

1.3 System Advisory Committee

In a few instances, an incorporated non-profit society operates more than one centre. Such operators may wish to form a SYSTEM ADVISORY COMMITTEE whose membership is comprised of representatives from each centre. This representation may include persons from morning and afternoon groups within the same centre.

Representation in a system advisory committee should arise from an active LAC which functions on behalf of each centre. LAC activity should be as close to the program as possible; association with a system advisory committee permits the sharing of responsibilities and programs which, in turn, prevents gaps and overlaps in services and program activities.

• See Appendix E for SUGGESTED SYSTEM ADVISORY COMMITTEE ACTIVITIES

1.4 Coordination of Services and Supplies

The purpose of coordination is to provide for efficient use of resources and services.

1.4.1 At local and regional levels there should be organized ways to coordinate health, social, recreation and education services to children and parents.

Locally, coordination may be provided through one or more of the following:

(a) Program Coordinator
(b) Local Advisory Committee
(c) System Advisory Committee where one exists.

To be effective, the local coordination plan should be based upon:

(a) Identified needs
(b) Written goals and objectives
(c) A clear division of duties among the individuals and committee(s) involved.

1.4.2 Operators and service agencies from several communities within a geographic area are encouraged to organize a Regional Coordinating Committee.

To be effective, regional coordination activities should be based upon:

(a) Needs of the region
(b) Written goals and objectives which are shared by members
(c) A well-organized structure for membership, leadership and communication.

Following are the four purposes of regional coordination:

(a) Identify regional needs and work towards meeting them
(b) Develop and implement an effective communication network within each regional coordinating committee

(c) Develop and implement an operational plan for coordinating the health, social, and education program for eligible children, parents and staff, with first priority being on special needs (handicapped) children and those children living in disadvantaged areas, and

(d) Assist local operators and service agencies within specified geographical areas to resolve issues and to develop and implement plans for the coordinated delivery of complementary services to children, parents and staff.

1.4.3 The basic instructional grant includes a Regional Coordination Grant and a Parent Resources Grant. The operator will likely designate some of the grant to local coordination and some to the activities undertaken by the Regional Coordination Committee to which the operator belongs. However, if an agreement is in place with the Regional Coordination Committee, the total grant may be forwarded directly to the committee. In this case, the grant and the corresponding coordination expenditures must still be reflected in the operator's Budget Report Form and Audited Financial Statement.

There is a network of Regional Coordinating Committees across the province. If an operator has not been approached about membership or presented with the advantages of this kind of affiliation, information can be obtained from the appropriate Regional Office of Alberta Education.

- See Appendix L for listing of Regional Offices of Alberta Education

Membership in this committee is usually made up of representatives from several ECS operators and service agencies. Operators of other programs for young children may also be invited to participate.

1.5 Organizational Structure

A clearly laid-out organizational chart and a locally-developed policy manual are essential tools in private societies whose membership, unlike that of school jurisdictions, may change entirely from year to year. The organizational chart of an incorporated, non-profit society requires regular review. The chart should include role descriptions and responsibilities of all persons involved in the ECS program.

The private society's organizational structure should show the Board of Directors (the legal operator) in a line position. Sub-committees of the board, the LAC staff and parents must have a place in the chart so that roles and responsibilities are clearly described.

The operator has responsibility for developing and maintaining policies for decision-making. The way in which parents and service agencies will be involved in the decision-making process may vary from program to program.

Some considerations for decision-making policy include:

(a) What decisions will be made by the:
- operator
- parents
- LAC
- ECS staff
- service agencies

(b) How decisions made by others will be ratified by the operator

(c) How the operator's plan will relate to the decision- making plan of the Regional Co-ordinating Committee to which the operator belongs

(d) How everyone involved will be kept informed.

II. ESTABLISHING POLICIES, GUIDELINES AND PROCEDURES

Local ECS policies must be compatible with those of Alberta Education. An incorporated non-profit society will develop its own policies, guidelines and procedures which should fit into the objectives of the society and reflect the expectations of society members.

Private operators may wish to review the policies, guidelines and procedures of the school jurisdiction(s) into which ECS children will go for Grade 1 and, in turn, look for compatibility. Areas of compatibility might include:

- entrance age
- placement and promotion
- evaluation procedures
- teacher/grade/school expectations
- program flexibility to accommodate individual needs
- parent involvement

Regional Coordination Committees provide assistance to private schools and private ECS operators in developing policies, guidelines and procedures.

- For further information, refer to the current Program Policy Manual, available from Central Support Services, Alberta Education.

III. ORGANIZING THE PROGRAM

3.1 Determining Program Needs

Planning an ECS program may begin with the identification of children's needs. Needs of parents, other family members, staff and community may be interrelated to the children's needs. Parents, regional ECS coordination committees and community agencies may

be involved with the ECS operator and staff in:

(a) determining needs of children, parents, staff and community as a basis for program development

(b) reviewing identified needs and determining the extent to which they are met.

Activities which may be helpful in identifying needs:

(a) analysis of surveys of education, health, cultural and social conditions in the community

(b) interagency seminars and Regional Coordination Committee meetings

(c) workshops, group discussions, or presentations by early childhood specialists

(d) study of audio-visual and print resources

(e) meetings which bring together parents, staff, agency representatives and program specialists.

3.2 Setting Goals and Objectives

Needs should be translated into GOALS... outcomes expected in behaviors, knowledge, skills and attitudes of children, parents and staff involved in the program.

- Refer to Sections II and III in Philosophy, Goals and Program Dimensions.

Outcomes of goals and objectives (sub-goals) are the focus of evaluation. This information may be useful in preparing the ANNUAL EDUCATION REPORT which all private ECS program operators are expected to submit to the appropriate Regional Office of Alberta Education by November 30.

All parents of children in the program and all involved staff should be familiar with the goals and objectives so that they can consider outcomes when asked to evaluate the program.

Goals and objectives should be child-specific, especially for special needs children who are attempting to overcome or cope with handicapping conditions. In addition, goals and objectives should be set for parent programs and staff inservice.

Regional Office of Alberta Education personnel will monitor ECS programs. They will want to see the goals and objectives of the program and may also wish to examine the implementation process and outcomes.

3.3 Implementing the Program

As the program progresses, the operator may wish to use a checklist to ensure that all

necessary implementation tasks and activities have been accomplished, are under way, or are scheduled for attention.

- See Appendix F for a PROGRAM PLANNING AND ADMINISTRATIVE PROFILE.

Whereas a program plan is no longer required by Alberta Education for program approval, Regional Office of Alberta Education personnel will expect the operator to have a program plan on file to be considered when the ECS program is monitored.

- For further information about monitoring, refer to the current Policy Program Monitoring Handbook.

3.4 Evaluating the Program

Because Alberta Education has implemented the ANNUAL EDUCATION REPORT in place of the many pre-program approval tasks of the past, operators are advised to place a good deal of emphasis upon program evaluation so that there will be a sound data base to use in reporting outcomes in the ANNUAL EDUCATION REPORT.

To carry out this task, parents and staff must have a clear understanding of the program and what it is supposed to do.

- Two documents which may assist operators in the task of evaluation are:

How to Evaluate Your ECS Program (1984)

Self-Evaluation: A Handbook for Early Childhood Services Staff (1984)

- Contact the appropriate REGIONAL OFFICE OF ALBERTA EDUCATION or your Regional Coordination Committee for assistance.

IV. ADMINISTERING THE PROGRAM

4.1 Legal Operator Status

To receive ECS grants, a society must be incorporated.

Incorporation may be accomplished under the SOCIETIES ACT, CHAPTER S-18 OF THE REVISED STATUTES OF ALBERTA, 1980 and subsequent amendments.

- For information, application forms and guidelines for incorporation, contact:

CORPORATE REGISTRY, Alberta Consumer & Corporate Affairs

Incorporation documents consist of:

(a) An application containing the objects of a society according to the form in Schedule A of the Societies Act

(b) By-laws containing provisions for all matters set out in Schedule B of the Act.

If an existing society, such as a community association or church, operates an ECS program, the objects and by-laws of that society must be compatible with PHILOSOPHY, GOALS AND PROGRAM DIMENSIONS, (1984). A society should not rely solely upon the sample by-laws provided by the CORPORATE REGISTRY; all aspects of an ECS operation which require by-laws should be determined by the program operator.

(a) New Operator must obtain and keep on file the society's INCORPORATION CERTIFICATE.

(b) Continuing Program Operator must obtain from the Corporate Registry and keep on file a LETTER OF STATUS dated after March 31 of each year.

NOTE The operator must ensure that the legal name of the society recorded with the Corporate Registry is used on all forms submitted to Alberta Education.

4.2 Certificated Teaching Personnel

4.2.1 Teachers' Requirements

An ECS operator shall employ as an ECS teacher only persons qualified as ECS teachers in accordance with the ECS Teachers' Qualifications Regulations. To qualify, a person shall possess:

(a) An Alberta teaching certificate of any class, and

(b) An Early Childhood Services Diploma

An operator will maintain all credentials for review upon request by Alberta Education personnel and must report the data for each employed ECS teacher on Part II of the NOTICE OF INTENT TO OPERATE AN ECS PROGRAM FORM. This document must be sent by September 30 of each school year to the appropriate Regional Office of Alberta Education.

4.2.2 ECS Diploma

An Early Childhood Services Diploma is issued by Alberta Education when a teacher has successfully completed FIVE full university courses (equivalent to 30 semester hours) in the following areas:

(a) Child Development

(b) Family Studies, Interpersonal Relationships, Community Relations

(c) Programming in ECS (methods courses)

(d) Curricular Areas (content courses)

(e) ECS Practicum.

A minimum of one half-course (equivalent to three semester hours) is required in each of the above five areas.

4.2.3 Competencies

When selecting staff, at a minimum, the following competencies should be considered:

(a) Effective communication skills

(b) Knowledge of child development and learning process

(c) Ability to plan, implement and evaluate programs for normal and special needs children

(d) Ability to work effectively with children, parents and resource people.

4.2.4 Teacher Responsibility

A qualified teacher is responsible for:

(a) Coordination of educational services in the children's program

(b) Identification of each child's needs and formulation of program objectives based on those needs

(c) Implementation of children's program activities

(d) Evaluation of children's progress.

4.2.5 Non-Certificated Teachers

Applicants who are not eligible for teacher certification may be eligible for a Letter of Authority under extraordinary circumstances. Applicants must be recommended to the Teacher Certification and Development Branch by an Alberta superintendent of schools or a person designated by Alberta Education to be an acceptable authority for recommending Letters of Authority (e.g., Regional Office of Education consultants, personnel officers in larger school systems).

4.2.6 Certificated Teachers Not Possessing an ECS Diploma

Certificated teachers who are not eligible for an ECS Diploma may be eligible for an Interim ECS Permit if sufficient local need has been demonstrated by the ECS operator. In order to be issued a permit, applicants must be recommended by an Alberta superintendent of schools or an Alberta Education ECS consultant.

The renewal of an Interim ECS Permit is contingent upon the successful completion of one full course (equivalent to six semester hours) per year towards the ECS Diploma. The appropriate official transcript must be provided as evidence of the required upgrading.

The status of the interim permit is under review in 1986-87.

4.2.7 Persons Not Eligible For A Letter of Authority and/or An Interim ECS Permit

Persons who are not eligible for teaching authority or an Interim ECS Permit may not serve as teachers in an ECS centre. However, in special circumstances persons who do not meet minimal qualifications as an ECS teacher may serve as instructional assistants in an ECS centre under the jurisdiction and supervision of a certificated teacher possessing an ECS Diploma. For grant purposes, the supervising teacher possessing an ECS Diploma requires approval. Both the supervising teacher and the instructional assistant must be recorded on Part II of the NOTICE OF INTENT TO OPERATE AN ECS PROGRAM FORM.

Special circumstances may be defined as one or more of the following conditions recognized by a Regional Office of Alberta Education:

(a) enrolment is nine or less

(b) combining of centres or use of common staff between centres is precluded by distance and/or lack of instructional space

(c) low enrolment and/or remoteness of location militates against recruitment of certificated staff

(d) short-term emergencies such as illness, accident, maternity leave or imminence of program termination

(e) special programs e.g., language.

Approvals for unqualified staff to teach in an ECS program are granted for a one year period. ECS operators must re-advertise for qualified staff every year.

4.2.8 Teacher Approval Procedures

The Teacher Certification and Development Branch is responsible for issuing regular teacher certification and the ECS Diploma. Consult the Director, Teacher Certification and Development, Alberta Education (427-2045) for assistance in making an application for teaching authority.

Each operator is responsible for submitting to the appropriate Alberta Education Regional Office a NOTICE OF INTENT TO OPERATE AN ECS PROGRAM FORM indicating the administrative and instructional personnel for each centre. ECS operators should hire their teacher(s) before submitting Part II of this form. The appropriate Regional Office of Alberta Education must be notified if the staffing complement changes subsequent to the submission of the NOTICE OF INTENT TO OPERATE AN ECS PROGRAM

FORM. Note that such changes include both permanent and temporary (long-term substitute) replacements.

Each teacher must complete a Certificated Personnel Resources (CPR) form which is distributed by Alberta Education Regional Office personnel to private ECS operators. The CPR form must be returned to the appropriate Regional Office of Education upon completion.

4.3 Provincially Approved Facility

If an incorporated non-profit society operates an ECS program in a school building, the space will usually meet school building standards and health/fire regulations.

Operators renting a facility are advised to obtain a lease agreement. If an operator is planning any renovations, a lease is REQUIRED in order to qualify for a renovation grant.

Terms of the lease should include:

- Length of time the lease is effective (at least three years)
- Responsibilities of owner and renter
- Rental rate
- Procedure to be followed if rates are to be altered during lease
- Lease termination procedures.

A non-school building must be approved by building standards, fire and health inspectors. To initiate these inspections, the operator should contact the appropriate Regional Office of Alberta Education as soon as possible because inspection and any necessary repairs and renovations may take several months. The operator should contact the appropriate Regional Office of Alberta Education as soon as a building has been selected.

Building approval remains in effect until withdrawn.

- Contact the appropriate REGIONAL OFFICE OF ALBERTA EDUCATION for assistance.

4.4 Alberta Education Audited Financial Statement (AFS) and Budget Report Form (BRF)

The financial year for private ECS operators in 1986 — 1987 is 14 months (from July 1, 1986 to August 31, 1987) so that the fiscal year-end can be changed from June 30 to August 31. (In future, the financial year will be September 1 through August 31.)

All operators must appoint an auditor who is either a Chartered Accountant (C.G.A. or C.M.A.) or a qualified person approved by the Minister of Education. To obtain ministerial approval, a request for "Ministerial Approval of Auditor" form should be obtained from the Administrative Accountant, School Business Administration Services Branch, and completed and returned by the prospective auditor. The operator will be subsequently notified of the results by the Branch.

Private operators submit the BRF within ninety (90) days of the beginning of the financial year. For 1986-87, submission of the BRF must occur by September 30. Beginning in 1987-88, the BRF submission deadline will be November 30.

Submission of the AFS must occur within ninety (90) days of the end of the financial year. For 1986-87, submission of the AFS must occur by September 30. Beginning in 1987-88, the AFS submission deadline will be November 30.

Refer to **Guidelines for Completion of the Alberta Education ECS Private Operators' Audited Financial Statement** or the **Guidelines for the Completion of the ECS Private Operators' Budget Report Form** available from the Administrative Accountant, School Business Administration Services Branch. As well, please refer to the **School Grants Manual Part 4** for further information. These documents are mailed to every ECS private operator early in the program year.

- Contact the Administrative Accountant, School Business Administration Services Branch for assistance (427-7235).

4.5 Enrolment Report

4.5.1 The enrolment of all registered children in an ECS program must be reported as of September 30, and submitted no later than October 22. This count must include all prospective 2 1/2 — 4 1/2-year-old special needs children. Operators need not force the identification and/or designation of special needs children if assessment and program plans are not complete as of September 30.

4.5.2 Operators have until November 30 to submit an updated enrolment report on children who are to be redesignated to special needs but **retained within the original September 30 total enrolment**. Underage children who do not qualify for special needs funding should be deleted from the September 30 enrolment report.

4.5.3 Program Unit Grant (PUG) children are exempt from this policy; however, PUG guidelines specify that no grant payment adjustments will be made for new PUG children after June 1.

- For further information about PUG children, refer to the SCHOOL GRANTS MANUAL, Part 4.

4.6 Transportation

Before the program commences, the operator should ensure that arrangements have been made for children requiring transportation to and from the ECS centre.

Children may be conveyed:

(a) In a vehicle registered as a school bus pursuant to the Public Vehicles Act, or

(b) By contract with the parent.

Transportation grants are available for all children who reside outside a city school district.

Urban operators require Regional Office of Alberta Education approval to claim grants for non-handicapped children transported to ECS centres. Transportation grants may be paid on behalf of children residing in a city when:

- A child is being transported to a bilingual/immersion program or a church-oriented alternative program
- The area in which the child resides does not have an approved facility
- There are too few children residing in an area to make an ECS program economically feasible.

The request should state:

- Which of the above reason(s) applies
- The number of children to be transported
- The area in which the children reside
- The name of the ECS Centre to which the children will be transported.

Special transportation grants are provided to support home visits of staff for approved in-home programs.

The following resources are available to societies who need assistance in arranging transportation:

- School board or county transportation supervisor
- Private bus operators
- Agencies which provide transportation for handicapped children
- Insurance agents
- Regional Office of Alberta Education consultant.

- See the SCHOOL GRANTS MANUAL, Part 4, for basic assistance in calculating and preparing transportation claims.

4.7 Capital Equipment Grant for New Instructional Area

A once-only furniture and/or equipment grant is available for the establishment of new instructional areas.

- Contact SCHOOL BUILDINGS SERVICES, Alberta Education for assistance.

4.8 Capital Renovation Grant

Private ECS operators are encouraged to use existing community facilities for centre-operated programs.

A grant is available to assist societies to make renovations to meet requirements of fire, health or building standard regulations.

This grant **cannot** be used to renovate private residences or buildings owned by school boards.

An operator applying for this grant must supply:

- A list of facilities which have been considered, indicating why each is unacceptable or unavailable
- Reports from health, fire and building inspectors indicating renovations required
- Plans for renovation which have been approved by fire, health and building standards inspectors
- Estimated costs of the renovations
- A cost of a three-year minimum lease with the owner of the building or proof that the ECS operator owns the building.

4.9 Annual Equipment Replacement Grant

An annual equipment replacement grant of $5.00 per child will be provided based on the enrolment report, and will be paid along with the basic instructional grant.

- For assistance, contact SCHOOL BUILDINGS SERVICES, Alberta Education.

4.10 Portables

If a suitable facility is not available, a society may apply to the Director of the appropriate Regional Office of Alberta Education for a government-owned portable classroom. The following information must be provided:

- A list of children eligible for the coming year and projected enrolments for the following two years
- A list of facilities which have been considered indicating why each is not acceptable
- A statement from the school board(s) indicating:
  (a) space is not available in the local schools, but
  b) willingness to allow placement of a portable on school property
- If the school board(s) will not allow placement of a portable on its property, a statement must be obtained from a local municipal authority indicating willingness to allow the placement of a portable on its property.

In order for portables to be ready for use by September, requests should be submitted to the Regional Office of Alberta Education prior to February 1.

The government will be responsible for all maintenance except daily caretaking services, light bulb replacements and utility charges. The government will assume all costs associated with the installation of the portable classroom.

A society using a portable will be charged a monthly fee for each month the program operates. The fee will be established prior to September and withheld from the society's monthly grant payments.

- For assistance, contact the appropriate REGIONAL OFFICE OF ALBERTA EDUCATION.
- For additional information refer to the SCHOOL GRANTS MANUAL, Reference 4.8.

4.11 Teachers' Retirement Fund

An ECS society may apply to the Grants Administration Unit to permit teachers to participate in the Teachers' Retirement Fund (TRF).

The letter of application should recognize the requirement for an employer's contribution and that all teachers employed by the operator must participate in the fund, once the application is approved.

If approved, the operator is required to:

(a) Contribute an amount equal to the contribution of each teacher plus 2%. The amount of the teacher's contributions is determined by the Board of Administrators of the TRF, but will not be less than 3% nor more than 7% of salary

(b) Deduct the required teacher's contribution from each teacher's monthly salary
(c) Forward monthly to TRF, the amount of the teacher's contribution and the employer's contribution, and
(d) Annually report to TRF each teacher's name, social insurance number, salary rate, total salary earned, amounts deducted and the number of days for which salary was paid.

4.12 Payroll-Revenue Canada Deductions

4.12.1 The three principal deductions are:

- Canada Pension Plan (CPP)
- Unemployment Insurance Commission (UIC)
- Income Tax

The UIC Record of Employment forms should be requested through the nearest Unemployment Insurance Commission office.

4.12.2 Deduction Tables:

A NEW ECS private operator may obtain an EMPLOYER'S KIT of current deduction tables, etc., from REVENUE CANADA TAXATION, GOVERNMENT OF CANADA.

A CONTINUING ECS private operator should automatically receive the deduction tables by December of the previous year. If not, the operator should contact REVENUE CANADA TAXATION for the documents.

4.12.3 Record of Employment Forms:

The UIC Record of Employment forms and a guide for their completion should be requested through the nearest Unemployment Insurance Commission office.

4.13 Insurance and Bonding

4.13.1 Parent Liability Insurance Coverage

Parents who transport children OTHER THAN THEIR OWN should be advised by the ECS private operator to obtain from the parents' insurance agent an additional RIDER for passenger coverage to their existing automobile insurance policy so that they may be adequately insured.

4.13.2 Operator Coverage

FOUR types of insurance should be carried by an ECS private operator:

- COMPREHENSIVE LIABILITY
- NON-OWNED AUTO
- FIRE AND THEFT CONTENTS
- FIDELITY BONDING

4.13.2.1 Comprehensive Liability

An ECS private operator must keep in force a comprehensive third party liability insurance policy in the minimum of $1,000,000 indemnifying the operator and its employees in respect to claims for damages arising from death, personal injury and/or property damage.

At present, liability insurance to cover volunteers may be obtained indirectly through a school jurisdiction insured with Jubilee Insurance Agency Ltd., via the jurisdiction adding the operator's required insurance coverage to its own policy.

Other alternatives for the insurance of volunteers are being investigated.

4.13.2.2 Non-owned Auto

An ECS private operator should carry non-owned automobile insurance to cover liability claims in excess of parents' private coverage outlined in 4.13.1 above.

4.13.2.3 Fire and Theft Contents

An ECS private operator may wish to carry contents insurance if the program is operated in a rented building. If the operator owns the building in which the program occurs, fire and theft (which includes contents) MUST be carried.

4.13.2.4 Fidelity Insurance (Bonding)

Every ECS operator shall engage the services of a bonded treasurer.

The treasurer must be bonded so that the ECS private operator will be reimbursed in the event of a fraudulent or criminal act by its treasurer. The amount of the bond should be equal to the amount of accumulated surplus plus one month's revenue.

- Contact an Insurance Agent regarding insurance and bonding rates which will provide adequate protection.

4.14 Federal Sales and/or Excise Taxes Refund Claims

If an ECS operator is certified as a bonafide public institution under SECTION 45(1) of the EXCISE TAX ACT, that operator may recover tax(es) paid when goods have been purchased on a tax paid basis.

- Consult SECTIONS 44, 45, 46, 49, and 59 of the EXCISE TAX ACT to determine eligibility to claim tax refunds and/or
- Contact the nearest DISTRICT EXCISE OFFICE for information and the form, N15-1/74, to be used when claiming a federal sales and/or excise taxes refund.

4.15 Grants Available to ECS Operators

See the SCHOOL GRANTS MANUAL, Part 4, for detailed information on all grants available to an incorporated non-profit society or private school.

Contact the nearest REGIONAL OFFICE OF ALBERTA EDUCATION or the GRANTS ADMINISTRATION UNIT in Edmonton (427-2051) for assistance.

4.16 Terminating the Operation of an ECS Program

When an ECS private operator decides to terminate the operation of an ECS program, the following guidelines apply:

4.16.1 An ECS operator may opt to go into recess for not more than one year before making a final decision on ceasing or resuming operations.

4.16.2 The final decision to cease operations must have been reached by the members of the society governing the ECS operations, at a general meeting called within the provision of that society's by-laws. This decision should be communicated to the appropriate Regional Office of Alberta Education as soon as possible.

4.16.3 If an ECS operator decides to terminate a program, the operator may transfer the program to another operator.

If another operator agrees to take over the program and to accept the transfer

of assets, liabilities, and any operating surplus and/or capital, the new operator must acknowledge receipt of this transfer and agree not to claim a capital grant. Written acknowledgement of and agreement to these terms must be sent to the Grants Administration Unit, Alberta Education.

4.16.4 If an ECS operator does not transfer its assets to another operator, Alberta Education will determine the amount of surplus from operations to be returned to the Provincial Treasurer. In addition, if a capital grant has been obtained within the final three years of operation, a portion of this grant must be returned.

- For additional information, refer to SCHOOL GRANTS MANUAL, Miscellaneous Section.

V. APPENDICES

A. List of Questions to be Considered in an Organizational Meeting

- What is an Early Childhood Services Program?
- Why is a program needed?
- Who should operate the program?
- What children are eligible?
- What funds and other resources are available locally and provincially?
- What suitable facilities are available?
- Will transportation be required?
- Is qualified staff available?

B. Society By-Laws, Membership, Directors and Responsibilities of Board Directors

In addition to those items outlined in the sample by-laws provided by the Corporate Registry, societies should ensure that:

- Annual meeting dates and election of officers coincide with the end of the ECS financial year (August 31)
- Provision is made at each annual meeting for a review of the society's objects and by-laws
- Provision is made in the by-laws for the resignation of a board

Membership

- Every society must state in its by-laws who will be eligible for membership
- Membership may be unrestricted or may be specified by: - Residence
  —Payment of an annual fee
  —Other qualification
- Provision for withdrawal or termination of membership is usually stated in a by-law
- Employees may hold membership in a society for which they work. **To avoid conflict of interest, employees are advised not to hold executive positions.** Such restriction should be recorded in the by-laws.

Directors and Their Responsibilities

- The Board of Directors has final responsibility for administration of all functions of the society and is accountable to the membership
- The by-laws of a society should specify: - How the Board of Directors is to be elected
  - What executive positions are required
  - The responsibilities of each position
- Usually, executive officers of the Board of Directors include a:
  - President
  - Vice-President
  - Secretary
  - Treasurer or Business Manager
- Sometimes the secretary and treasurer positions are held by one person
- It is acceptable to have an appointed or employed treasurer which may be a non-voting position
- Duties may be delegated to individual board members, to the Local Advisory Committee (LAC) or to employees and volunteers
- Plans developed by individuals or groups to fulfil designated duties should be presented to the Board of Directors for approval before the plans are implemented. This keeps everyone informed and maintains the legal obligations of the Board
- Decisions relative to all expenditures are to be duly recorded in the minutes.

1. **President**

The President is the senior executive officer responsible for:

- Ensuring society affairs are conducted according to the objects and by-laws
- Coordinating all business affairs of the society
- Planning and conducting annual and special meetings of the society as well as meeting of the Board of Directors
- Supervising the activities of all other positions to ensure that their duties are being properly fulfilled
- Serving as an ex-officio member of all committees of the society

2. **Vice-President**

The Vice-President is an executive officer responsible for:

- Assisting the president in conducting the society's affairs
- Undertaking the president's duties when that person is absent
- Accepting responsibility for other designated duties

3. **Secretary**

The Secretary is an executive officer responsible for:

- Preparing and maintaining on file, minutes of the duly-called meetings of the society and the Board of Directors

- Preparing, receiving and maintaining on file, all correspondence for the society and the board
- Keeping a record of society members
- Accepting responsibility for other designated duties

4. Treasurer or Business Manager

The Treasurer or Business Manager may be an elected, appointed or employed position responsible for:

- Ensuring financial accounts, contracts and agreements are conducted according to sound accounting and business practices
- Maintaining on file, staff employment documents
- Receiving monies payable to the society
- Depositing cash and cheques promptly
- Paying accounts on the basis of authorization recorded in the minutes
- Keeping a detailed record or synoptic of all monies received and expended
- Balancing financial books and preparing a bank reconciliation statement each month
- Presenting a monthly financial report to the executive and the annual Audited Financial Statement to the society
- Maintaining a file of all cancelled cheques, bank statements, invoices, correspondence and copies of completed/submitted forms
- Preparing the Notice of Intent and Grant Claim forms and mailing them to the Grants Administration Unit or to the nearest Regional Office of Alberta Education as requested
- Preparing the annual Budget Report Form for adoption by the society and submission to the School Business Administration Services Branch
- Arranging for and submitting the annual Audited Financial Statement containing an Auditor's Report, signed by the auditor, for the fiscal year to the School Business Administration Services Branch
- Submitting the Annual Education Report to the appropriate Regional Office of Alberta Education.

C. Minutes

The minutes of a non-profit incorporated society constitute its authority to operate. Minutes should be:

- Brief
- Factual and accurate
- Organized with all motions duly recorded
- Available for inspection at all times

As official documents which record the affairs and decisions of the society, the minutes should include:

- The date, time and place of each meeting
- The kind of meeting (regular or special)
- The name of the chairperson of the meeting

- A list of members and guests attending
- Approval of minutes of preceding meeting which should then be signed by the president
- A summary of individual and committee reports (written reports to be attached to the minutes)
- Decisions made, whether by consensus or by motion
- The mover, the seconder and result (carried or lost) of each motion
- Policies and administrative procedures not defined in the by-laws
- A statement of the total amount of monthly accounts payable
- A record of motion authorizing the treasurer to pay monthly accounts and make other business transactions
- Any item of information as directed by the society or board.

If a meeting concludes before the agenda is completed, remaining items should be recorded in the minutes and placed before the next meeting.

As legal records of the society, the minutes form part of the accounting records. As such, the minutes provide the authorization for payment of legitimate expenses and a record of:

- Adoption of the annual budget
- Establishment of positions, pay rates, commencement and termination dates and other special circumstances related to staff appointments
- Authorization of emergency or special expenditures not provided in the budget
- Authorization of all financial and contracting arrangements

Because of their importance, minutes are usually the first documents to be impounded in the event of court action and are central to any investigation.

D. Local Advisory Committee (LAC) Responsibilities and Membership

1. Responsibilities

The LAC may:

- Recommend policy and administrative procedures to the operator on such matters as staffing, hours of operation and fees
- Participate in planning, implementation and evaluation of the program for children, parents and staff
- Assist in obtaining resources and services
- Recommend, and participate in, plans for effective communication among operator, parents, staff and service agencies
- Assist parents to be involved in annual assessment of needs and goal-setting for the program

2. Membership

The majority of members of the LAC each year should be parents of children in the program.

To provide continuity from year to year, some parents from the previous year's committee and those whose children may be in the program in future years should be included.

The LAC may include resource persons in the community, and ECS staff members should also be encouraged to attend.

E. Suggested System Advisory Committee Activities

- Planning for coordination of activities, resources and services for all centres in the system
- Planning for effective communication among centres
- Recommending policy and administrative procedures related to the operation of the system
- Program evaluation
- Identifying needs; e.g., children, staff, parents, community
- Facilitating workshops
- Providing leadership in identifying problems and issues, recommending solutions and assisting in carrying out solutions.

F. Program Planning and Administrative Profile

The following checklist of activities is to serve as a partial planning guide for those who organize and carry out an ECS program.

A the activity **has already been carried out;**
W the activity is planned and **will be carried out;**
X the activity will **not** be carried out;
N the activity is **not** applicable to the centre.

ACTIVITY

I. COORDINATION

1. Take out membership in the nearest regional/subregional coordinating committee.

   1.1 Name of Coordinating Committee:

   _____

2. Appoint representatives to attend coordinating committee functions.

   2.1 Name of representatives:

   _____

   2.2 Each representative's telephone number:

   _____

3. **Plan coordination activities.**

   3.1 Approve plan in conjunction with the Coordinating Committee.

   3.2 Prepare budget for coordination activities.

ACTIVITY

II. ADMINISTRATION

1. Form Local Advisory Committee (LAC).
2. Hold at least one joint meeting between LACs from the previous year and the upcoming year.
3. Schedule regular LAC meetings.
4. Plan regular opportunities for LAC to meet with society/school administration (board of trustees).
5. Produce a calendar of events, a regular newsletter or other means of providing or obtaining information.
6. Make sure there is a clear, written plan for communication.
7. Make sure there is a decision-making chart to show who makes what decisions.
8. Participate in the annual zone Financial Management and Treasurers' Workshops coordinated in spring or early fall by the Regional Offices of Alberta Education.
9. Review society by-laws and revise if necessary.
10. Review society/school board policies relative to the ECS program.
11. Prepare Annual Education Report

ACTIVITY

III. PROGRAM

1. Carry out a survey of children's general needs to be met in the program.

   1.1 Identify the requirements of special needs (handicapped) children.
   1.2 Identify needs of disadvantaged children.

1.3 Identify needs of regular children.
1.4 Modify program to accommodate new needs.

2. Survey parents' needs and plan a suitable program to meet parental requirements and expectations.

2.1 Budget for the parents' program.

3. Survey staff needs and plan an inservice program to assist staff in carrying out program responsibilities.

3.1 Budget for staff inservice.

4. Plan field experiences which complement the programs for children, parents and staff.

5. Identify community resources/services to assist in meeting the needs of children, parents and staff.

6. Develop a plan for mid-year and year-end evaluation of program outcomes.

ACTIVITY

IV. ORIENTATION

1. Arrange spring meeting(s) to acquaint parents, staff, and other interested persons in the ECS program.

2. Plan fall meeting(s) for those who miss the spring orientation, and for those who move into the community during the summer.

3. Plan other ongoing activities to keep the program profile high in the community.

4. Arrange/share in a transition activity for the children and parents who are moving out of ECS into Grade 1.

5. Conduct a registration and information gathering activity for prospective ECS clients.

6. Schedule 'in-home' visits or some alternative activity to acquaint children, parents and staff early in the program.

7. Make society by-laws and policies/school board regulations and policies available to all prospective parents and staff for study and clarification.

8. State expected participation of parents, staff and appropriate resource persons in the development of the ECS Program.

G. Role Descriptions for Coordinator, Instructional Assistant and Aide

1. Coordinator

The Coordinator's responsibilities may be to:

- Assist other staff and LAC to develop the program
- Assist in recruitment of other staff
- Assist in budget preparation
- Identify and arrange for the use of community resources and services
- Provide leadership in planning, implementing and evaluating programs for children, parents and staff
- Represent the operator on a regional coordination committee

2. Instructional Assistant

A qualified instructional assistant should have college training in early childhood development and in family studies.

Under the supervision of a qualified teacher, an instructional assistant may be assigned a wide range of instructional responsibilities such as:

- Assisting children in special programs
- Providing individual or small group instruction
- Directing a variety of group activities

An instructional assistant is responsible to the certificated teacher of the program.

3. Aide

Volunteer or paid aides who have interests and skills related to working with children and families may be assigned general responsibilities which support the work of teachers and instructional assistants.

A rehabilitation aide may be required in order to facilitate a special needs (handicapped) child's progress in a regular ECS program.

An aide is responsible to the certificated teacher in whose program the aide is working.

H. Staff Contracts

An operator's advertisement for staff should state:

- Type of position
- Required training and experience
- Name and location of the program
- Where to apply

No commitments should be made to a prospective teacher until the teacher's qualifications have been approved by the Teacher Certification and Development Branch, Alberta Education (427-2045).

The contract for each staff member should include:

- Working conditions such as hours and days when staff are to be on duty
- Supervision of children on a playground or in a gymnasium
- Responsibilities for children before and after program sessions, on field trips and during inclement weather
- Travel and subsistence allowances for in-home visits
- Responsibilities of employee
- Duration of contract
- Conditions under which contract may be terminated
- Benefits such as paid holidays, retirement fund contributions, financial assistance, and leaves for professional development, maternity or other special circumstances
- A clause stating that the contract is valid only if the teacher's qualifications are approved by the Teacher Certification and Development Branch, Alberta Education.

All contract conditions are to be consistent with the by-laws of the society.

I. Staffing Guidelines

The suggested number of children for whom a teacher may be responsible without additional staff is:

22, if the program is designed for children with normal needs

fewer, if the program is designed to include children in designated disadvantaged areas or children with special needs.

Notwithstanding these criteria, auxiliary staff should be assigned according to needs of the children.

These criteria have no regulatory status.

J. Department of Education Act — Alberta Regulation 153/74

NOTE The following regulations are provided for information ONLY and are currently under review.

Early Childhood Services Teachers' Qualifications Regulation Amended: A.R. 10/85

1. In these regulations:

(a) "Alberta teaching certificate" and "letter of authority" means a certificate issued pursuant to the Regulations Governing the Certification of Teachers

(b) "special early childhood services diploma" means a diploma issued by the Minister

(c) "Minister" means the Minister of Education

(d) "interim permit" means a permit to teach in an approved early childhood services program

(e) "operator" means

(i) a board of trustees of a school district or school division and includes the council of a county and the council of a city or town merged pursuant to the Municipal and School Administration Act whose early childhood services program has been approved by the Minister;

(ii) a society or a corporation that

(A) is a non-profit organization

(B) is incorporated under the Societies Act, the Companies Act, or Cooperatives Association Act

(C) has filed with the Minister evidence of incorporation along with a copy of the by-laws of the society or corporation, and

(D) has had its program approved by the Minister;

(iii) an individual

(A) who does not operate for monetary gain, and

(B) whose program has been approved by the Minister.

2. An operator in conducting an early childhood services program may employ as early childhood services teachers only those persons qualified as early childhood services teachers in accordance with these regulations.

3. To qualify as an early childhood services teacher, a person shall have:
— an Alberta teaching certificate or a letter of authority and
— a special early childhood services diploma or an interim permit.

4. To be eligible for a special early childhood services diploma, the holder of an Alberta teaching certificate or a letter of authority shall have completed five full university courses in early childhood specialization areas or equivalents acceptable to the Minister.

5. (a) Commencing with the school year 1974-75, to qualify for an interim permit, the holder of an Alberta teaching certificate or a letter of authority must:

(i) be recommended to the Minister by an operator, and

(ii) have completed at least two full university courses in an early childhood specialization.

(b) An interim permit expires at the end of each school year and may be renewed.

6. Commencing with the school year 1975-76, the minimum academic requirement for an interim permit shall be at least three full university courses in an early childhood specialization or acceptable equivalents.

7. Commencing with the school year 1976-77, the minimum academic requirement for an interim permit shall be at least four full university courses in an early childhood specialization or acceptable equivalents.

8. Commencing in the school year 1977-78, the minimum academic requirement for an early childhood services teacher shall be an Alberta teaching certificate and a special early childhood services diploma.

9. Notwithstanding the other provisions of these regulations, the Minister may, in special circumstances, issue interim permits to teach in an approved early childhood services program.

10. Alberta Regulation 214/73, being The Early Childhood Services Teachers' Qualifications Regulations, is hereby rescinded.

The Department of Education Act — Alberta Regulation 249/76

Early Childhood Services Financial Reporting and Management Regulations

Amended: A.R. 281/76, 323/78, 185/80, 342/81, 176/82, 489/82, 57/83, 42/84, 20/85, 340/85, 263/86.

1. (1) In these regulations, "operator" means a person, other than
   (i) a board (as defined in the School Act), or (ii) a private school approved by the Minister under section 10(4) of the Department of Education Act,

   who operates an early childhood services program and in respect of the operation of that program receives a grant under the School Grants Regulations.

   (2) The 1985-86 "financial year" means the period from July 1, 1985 to June 30, 1986, the 1986-87 "financial year" means the period from July 1, 1986 to August 31, 1987 and after that the "financial year" means the period of time from September 1 to the next following August 31.

2. An operator shall appoint

   (a) a secretary and a treasurer, or one person to be both the secretary and treasurer, and
   (b) a chartered accountant, a certified general accountant, a certified management accountant or other qualified person approved by the Minister to be the auditor

   and shall report their names and addresses to the Minister.

3. (1) An operator shall, within a reasonable time of appointing a treasurer, obtain a bond between the operator and the company with a bonding or insurance company for the indemnification of the operator in the event of loss to him by reason of the fraudulent or criminal act of the treasurer and shall report the details of the bond to the Minister.

   (2) If an operator is unable to obtain a bond for the person he has appointed treasurer, he shall forthwith appoint another person to be treasurer.

4. (1) Within 90 days after the end of a financial year, an operator shall submit to the Minister the original and one copy of a financial statement in Form 1 for the financial year, containing an auditor's report signed by the auditor.

(2) The original of the financial statement shall be signed by the operator, or by its chairman or president and by the treasurer and the copy shall be certified by the treasurer to be a true copy.

5. (1) Within 90 days of the beginning of a financial year, an operator shall submit to the Minister the original and one copy of a budget report in Form 2 for that financial year.

(2) The original of the budget report shall be signed by the operator, or by its chairman or president and certified by the treasurer to be true and correct and the copy shall be certified by the treasurer to be a true copy.

6. (1) An operator shall obtain and keep in force a comprehensive general liability insurance policy in the minimum amount of $1 000 000, exclusive of any interest charges imposed and any other costs, for any loss or damage resulting from bodily injury to or the death of 1 or more persons, and for loss or damage to property, regardless of the number of claims arising from any 1 occurrence.

(2) The policy under subsection (1) shall provide coverage to an operator for all claims arising by reason of any liability imposed by law on an operator for any liability assumed under any agreement entered into by the operator.

(3) An operator shall ensure that in any comprehensive general liability policy which the operator obtains, the word "insured" shall be defined to include the named insured and also any employee, board member, agent, or any other person whether receiving compensation or not, acting within the scope of his duties for the named insured.

(4) In obtaining the comprehensive general liability insurance policy, an operator shall consider those insurance coverages set out in the Schedule and any other types of coverage that the operator considers it may require.

7. SCHEDULE

An operator shall consider the following types of insurance coverage when determining its comprehensive general liability insurance policy under section 6 of this Regulation

(a) premises, property and operations liability coverage
(b) products and completed operations liability coverage
(c) owner's and contractor's protective liability coverage
(d) blanket written contractual liability coverage
(e) personal injury liability coverage
(f) property damage occurrence liability coverage

(g) contingent employer's liability coverage
(h) non-owned automobile liability coverage
(i) cross-liability coverage

K. Listing of Regional Offices of Alberta Education

Zone 1
Grande Prairie Regional Office
5th Floor, Nordic Court
10014 - 99th Street
Grande Prairie, Alberta
T8V 3N4

Phone: 538-5130

Zone 2 and Zone 3
Edmonton Regional Office
8th Floor, Harley Court
10045 - 111th Street
Edmonton, Alberta
T5K 1K4

Phone: 427-2952

Zone 4
Red Deer Regional Office
3rd Floor, West
Provincial Building
4920 - 51st Street
Red Deer, Alberta
T4N 1X9

Phone: 340-5262

Zone 5
Calgary Regional Office
Room 1200, Rocky Mountain Plaza
615 Macleod Trail S.E.
Calgary, Alberta
T2G 4T8

Phone: 297-6353

Zone 6
Lethbridge Regional Office
Provincial Building
200 - 5th Avenue South
Bag Service 3014
Lethbridge, Alberta
T1J 4C7

Phone: 329-5243

L. Summary of Forms and Dates for Submission

February 1	Requests for portables for September must be submitted
June 1	Grant payment adjustments terminate for new PUG children
June 30	Notice of Intent (Part 1) Program Application Forms
September 30	Notice of Intent (Part 2) — Teacher information Enrolment must be **reported**
September 30 (1986-87) thereafter, November 30	Budget Report Form
October 1	Certificated Personnel Resources Form
October 22	Enrolment must be **submitted**
November 30	Annual Education Report, based on outcomes of goals and objectives, submitted to the appropriate Regional Office of Alberta Education
	Audited Financial Statement
	Deadline for redesignation of children from regular to special needs category (who were already included in the September 30th count)